



New Jersey's Bio-Pharmaceutical Life Sciences Landscape

Prepared
Winter 2012–13



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Produced by the
Office of Labor Planning and Analysis
of the
New Jersey Department of Labor and Workforce Development



Winter 2012–13

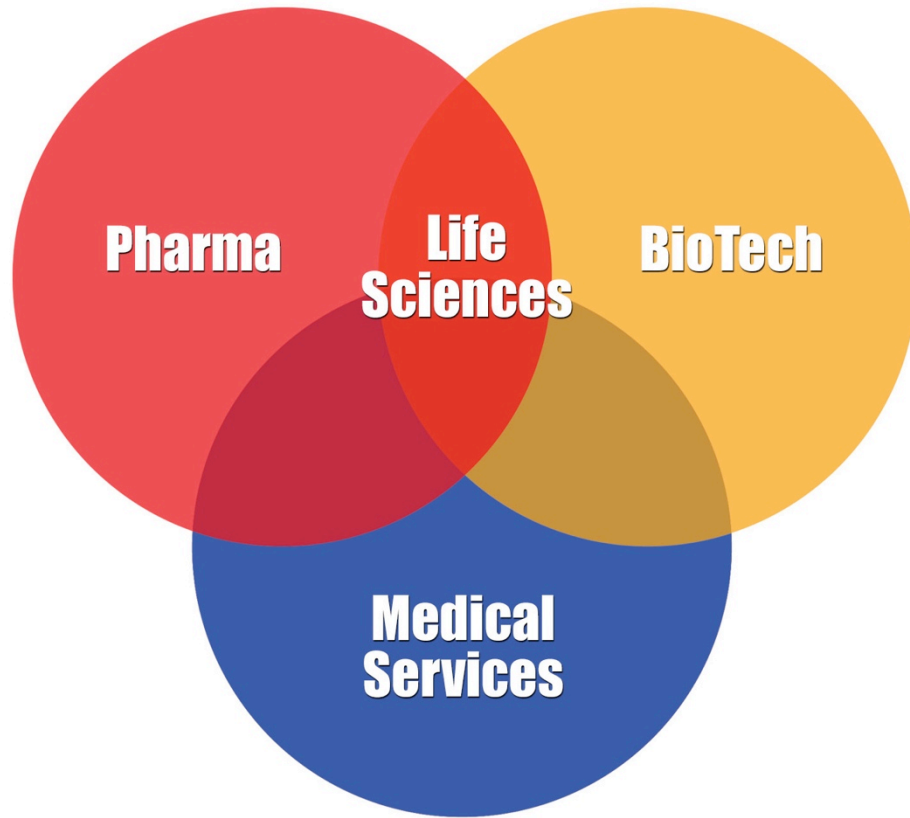


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New Jersey Bio-Pharmaceutical Life Sciences Cluster

Agenda



- Highlights of New Jersey's Bio-Pharmaceutical Life Sciences cluster
- State & regional details about New Jersey's Bio-Pharmaceutical Life Sciences cluster
- Regional economic developments
- Recent cluster developments relevant to New Jersey's Life Sciences cluster



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New Jersey Bio-Pharmaceutical Life Sciences Cluster

Overview

**What does the
Bio-Pharmaceutical
Life Sciences
Cluster
offer New Jersey?**

Let's take a look!



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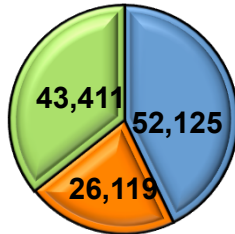
Overall State Impact

The Bio-Pharmaceutical Life Sciences cluster has had an enormous impact on growing high-quality jobs and adding significant value to the state's economic activities.

Highlights in 2011 included:

Employment

- Pharmaceuticals
- Medical Devices
- BioTech R&D

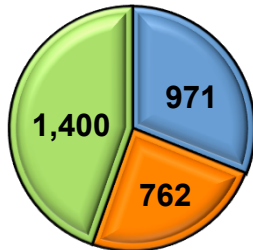


*Employment total averaged 121,655 — or 3.9 percent — of all private sector workers in the state. **Nationally, the proportion was just 2.0 percent!***

- **Well-paying jobs:** Paid more than \$14.5 billion in annual payroll — 8.1 percent of the state's total wages.

Establishments

- Pharmaceuticals
- Medical Devices
- BioTech R&D



Over the past five years (2006-2011), establishments realized an increase of 236 (+8.1%). Pharmaceuticals led the way, increasing by 14.0%.

- **Investment added value:** Industry R&D was \$18.4 billion, the second highest among the 50 states. (2009)

- ❖ **Added to export opportunities:** New Jersey exported approximately \$4.8 billion in manufactured goods worldwide in 2011.
- ❖ **Added to growing the state's economy:** This cluster accounted for \$23 billion (nearly 5.0%) of New Jersey's gross domestic product. (Source: Rutgers, 2009)



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Industry Details
of
New Jersey's
Bio-Pharmaceutical
Life Sciences
Cluster

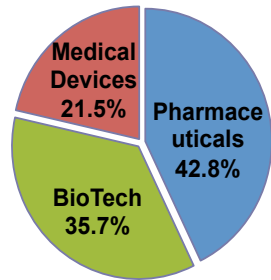


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Statewide Employment

Cluster Employment
2011

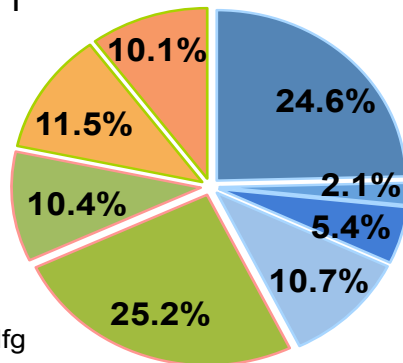


■ Pharmaceuticals
■ BioTech
■ Medical Devices

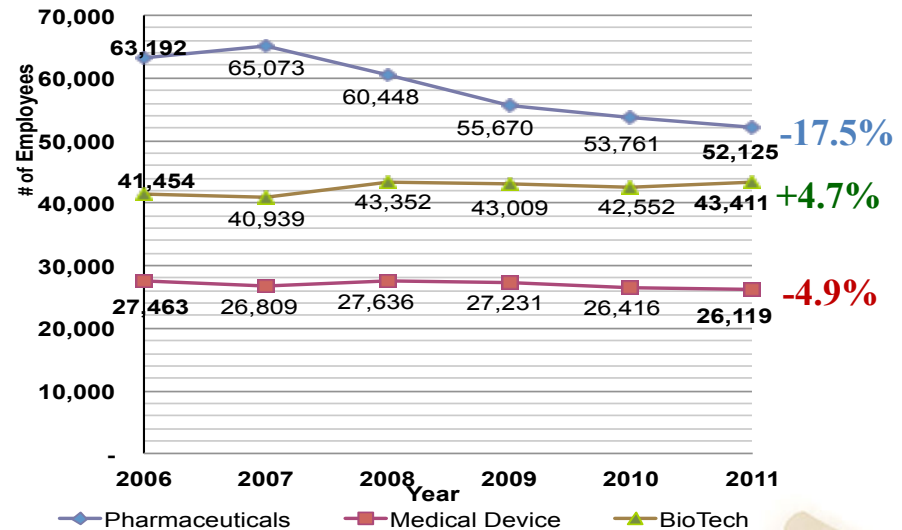
New Jersey had an average of 121,655 employees in this cluster in 2011. The cluster lost 7.9 percent employment over the 5-year period 2006-2011.

Industry Employment
2011

■ Pharma & Medicine Mfg.
■ Soap & Compound Mfg.
■ Toilet Prep Mfg.
■ Drugs & Druggists Sundries W/S
■ Scientific R&D Services
■ Medical & Diagnostic Labs
■ Measuring & Cont'l Inst Mfg.
■ Medical Equipment & Supplies Mfg



5-Year Employment Trend
2006 - 2011



SOURCE: Quarterly Census of Employment and Wages, 2011



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Concentration of Employment

Life Science
Percent of Total Employment
(2011 Annual Averages)

Northern Region

Employment: 59,319

Central Region

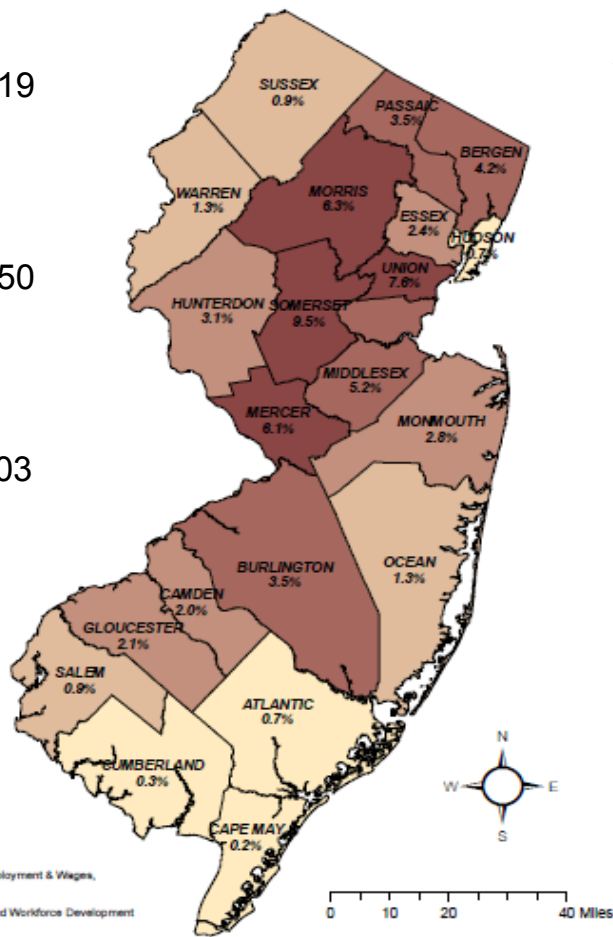
Employment: 48,150

Southern Region

Employment: 11,603

Unidentifiable by Region

Employment: 2.1%



Data Source: Quarterly Census of Employment & Wages,
2011 Annual Averages, NJLWD
Prepared by:
New Jersey Department of Labor and Workforce Development
Bureau of Labor Market Information
November 2012

New Jersey's Bio-Pharmaceutical Life Sciences cluster employed an average of 121,655 workers in 2011. The breakdown of this highly talented workforce *by region* was as follows:

- ❖ **Northern NJ** accounted for 48.8 percent of Life Sciences employment with the largest share working in **Pharmaceuticals** (47.1%).
- ❖ **Central NJ** accounted for 39.6 percent of Life Sciences employment with the largest share working in **BioTech** (42.8%).
- ❖ **Southern NJ** accounted for 9.5 percent of Life Sciences employment with the largest share working in **Medical Devices** (63.3%).

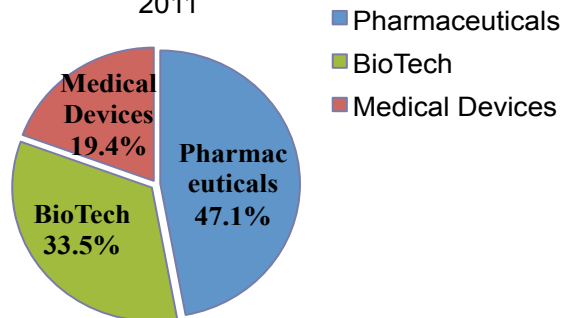


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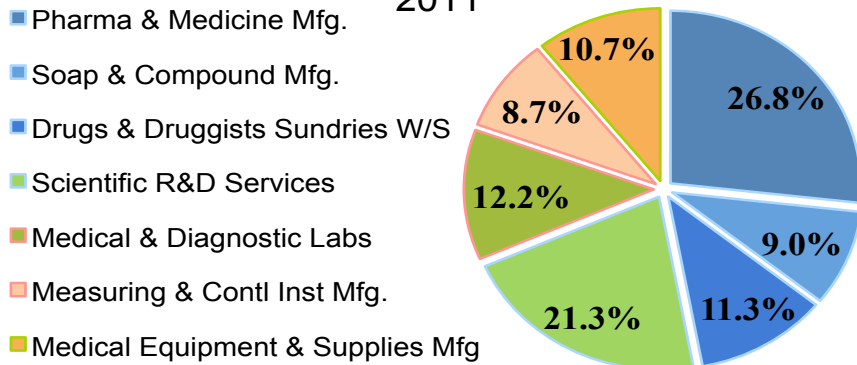
Northern NJ Regional Employment

NNJ Regional Employment
2011

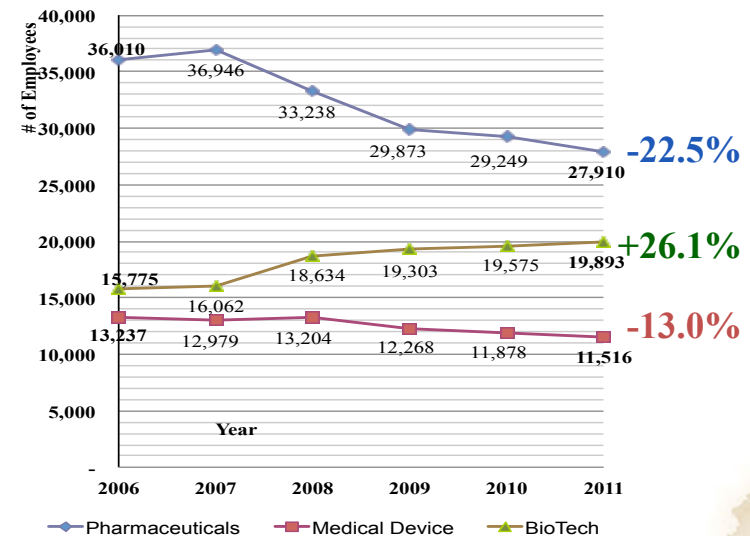


Over 59,300 workers were employed in this cluster in Northern New Jersey in 2011. The cluster's employment in this region declined by 8.8 percent over the 5-year period 2006–2011.

NNJ Industry Employment
2011



5-Year Employment Trend



SOURCE: Quarterly Census of Employment and Wages, 2011

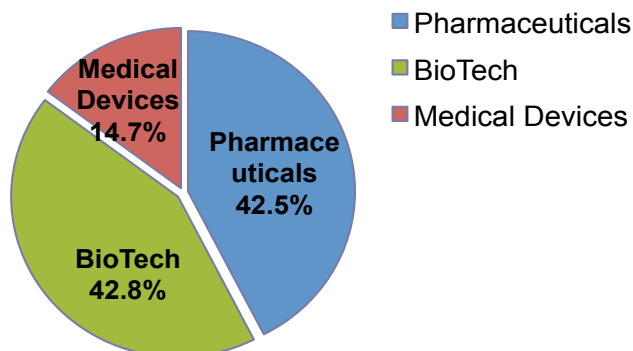


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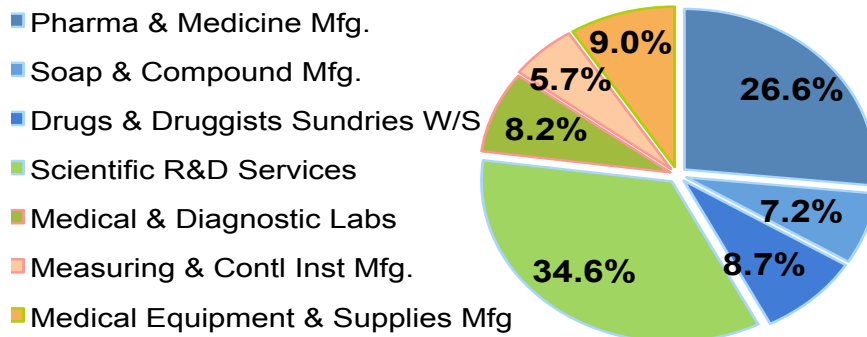
Central NJ Regional Employment

CNJ Regional Employment
2011

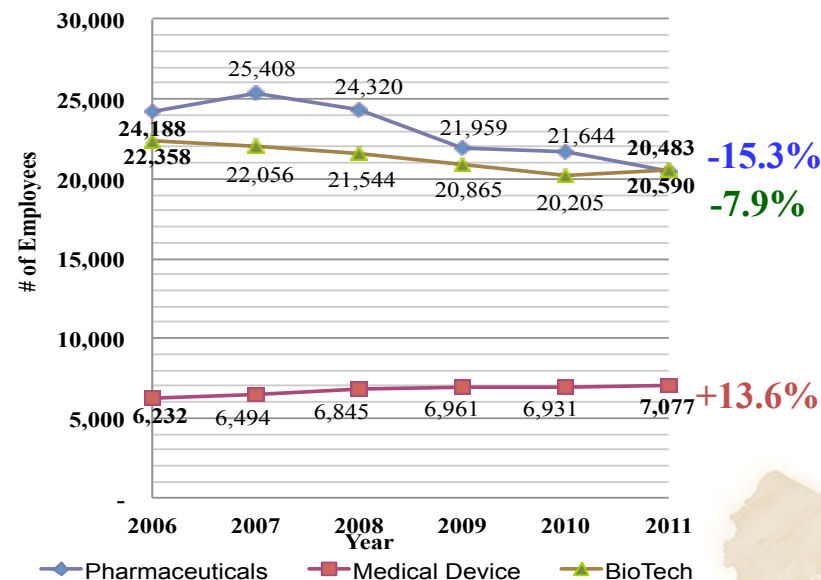


An average of 48,150 workers were employed in this cluster in Central New Jersey in 2011. Within this region, this cluster's employment declined by 8.8 percent over the 5-year period 2006–2011.

CNJ Industry Group Employment
2011



5-Year Employment Trend



SOURCE: Quarterly Census of Employment and Wages, 2011



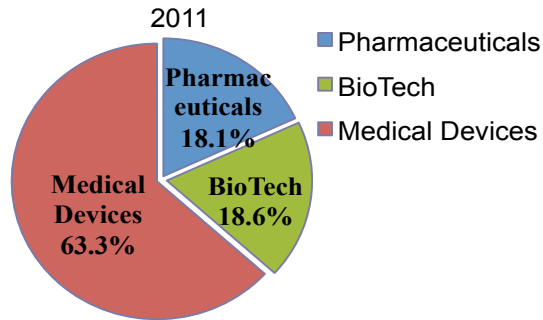
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Southern NJ Regional Employment

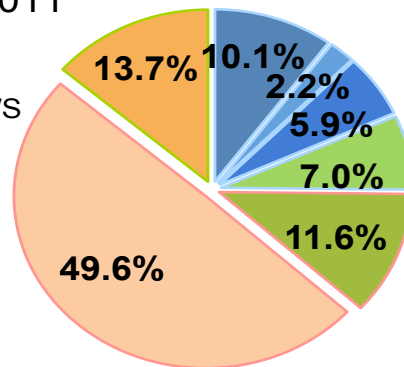
Over 11,600 workers were employed in this cluster in Southern New Jersey in 2011. This cluster's average employment in this region declined by 6.2 percent over the 5-year period 2006–2011.

SNJ Regional Employment

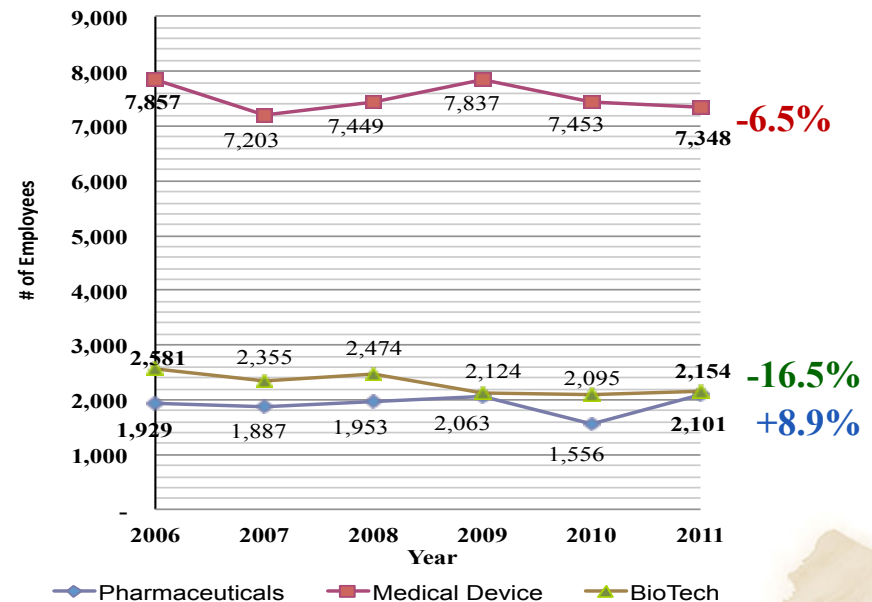


SNJ Industry Employment

- Pharma & Medicine Mfg.
 - Soap & Compound Mfg.
 - Drugs & Druggists Sundries W/S
 - Scientific R&D Services
 - Medical & Diagnostic Labs
 - Measuring & Cont'l Inst Mfg.
 - Medical Equipment & Supplies Mfg
- 2011



5-Year Employment Trend



SOURCE: Quarterly Census of Employment and Wages, 2011



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Concentration of Pharmaceutical Employment

*Pharmaceutical Employment - New Jersey Counties
(2011 Annual Averages)*

Northern Region

Employment:

27,900 (apx)

Central Region

Employment:

20,500 (apx)

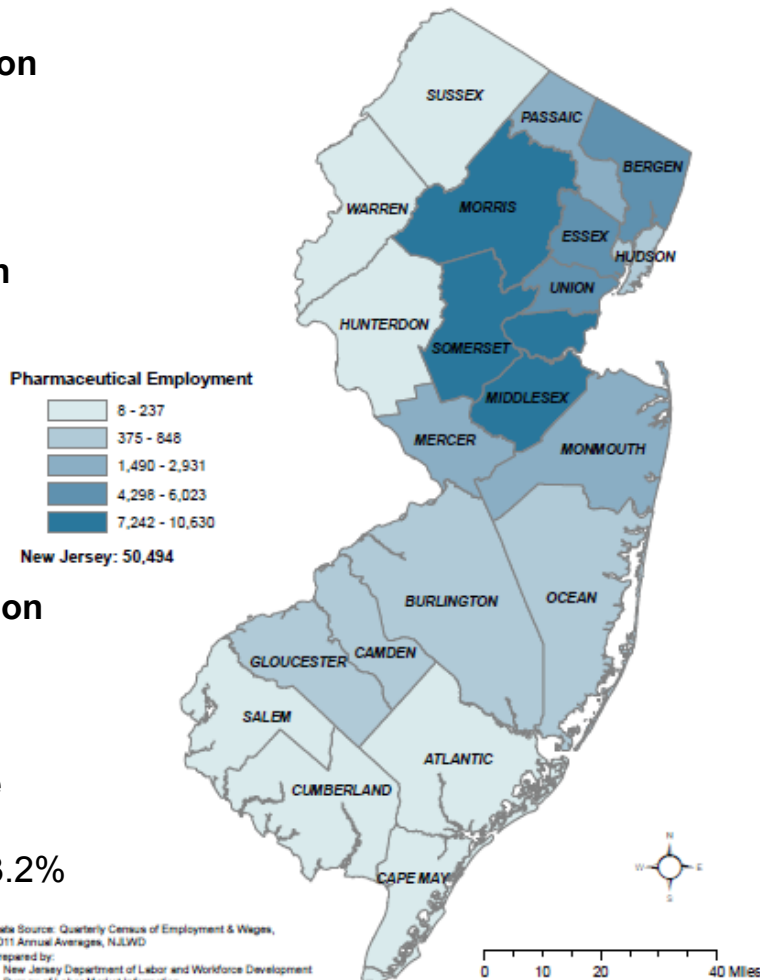
Southern Region

Employment:

2,100 (apx)

Unidentifiable by Region

Employment: 3.2%



New Jersey's Pharmaceutical employment averaged 52,125 in 2011.

The breakdown *by region* was as follows:

- ❖ **Northern** accounted for 53.5%.
- ❖ **Central** accounted for 39.3%.
- ❖ **Southern** accounted for 4.0%.



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Concentration of Biotechnology Employment

*Biotechnology Employment - New Jersey Counties
(2011 Annual Averages)*

Northern Region

Employment:

19,900 (apx)

Central Region

Employment:

20,600 (apx)

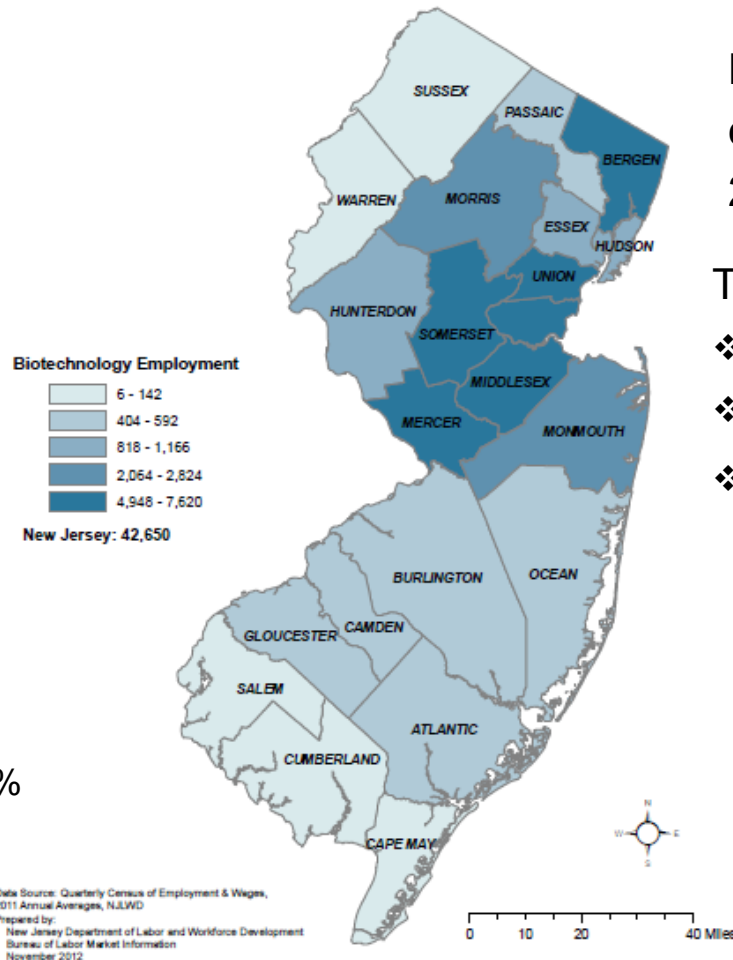
Southern Region

Employment:

2,200 (apx)

Unidentifiable by Region

Employment: 1.6%



New Jersey's Biotechnology employment averaged 43,411 in 2011.

The breakdown *by region* was as follows:

- ❖ **Northern** accounted for 45.8%.
- ❖ **Central** accounted for 47.5%.
- ❖ **Southern** accounted for 5.1%.



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Concentration of Medical Device Employment

Medical Device Employment - New Jersey Counties
(2011 Annual Averages)

Northern Region

Employment:

11,500 (approx)

Central Region

Employment:

7,100 (approx)

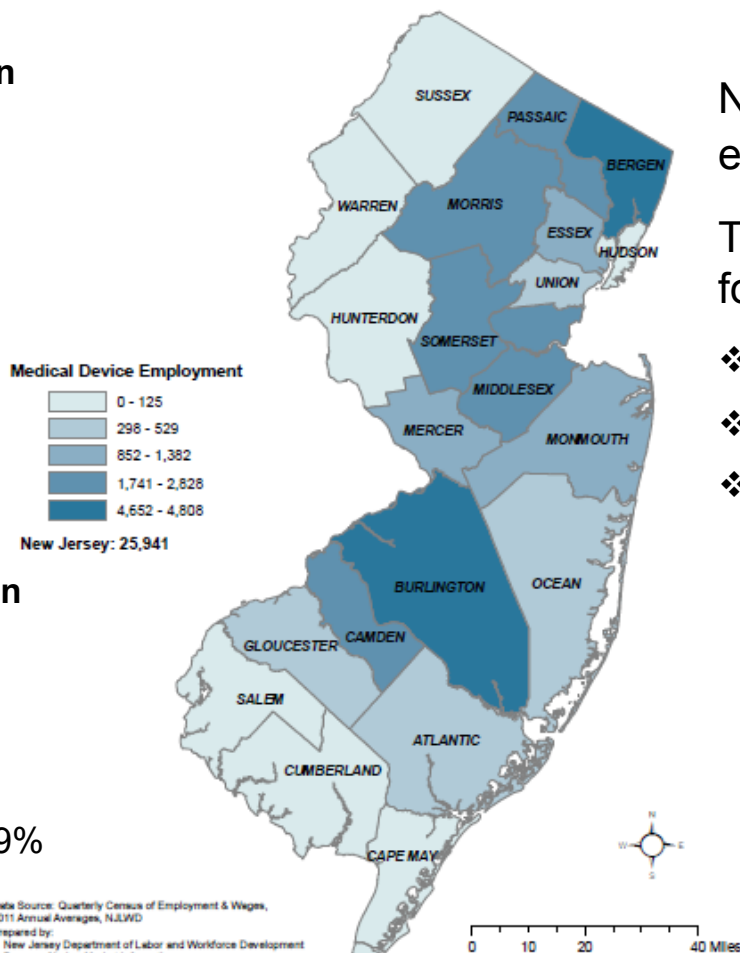
Southern Region

Employment:

7,300 (approx)

Unidentifiable by Region

Employment: 0.9%



New Jersey's Medical Device employment averaged 26,119 in 2011.

The breakdown *by region* was as follows:

- ❖ **Northern** accounted for 44.0%
- ❖ **Central** accounted for 27.2%
- ❖ **Southern** accounted for 27.9%

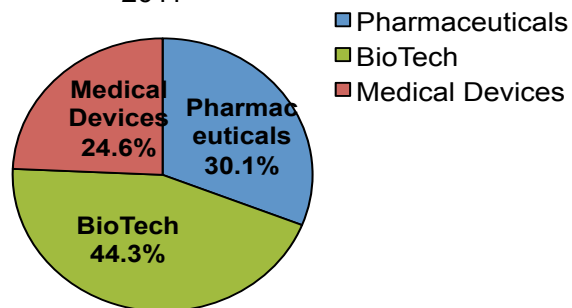


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Statewide Establishments

Statewide Establishment
2011

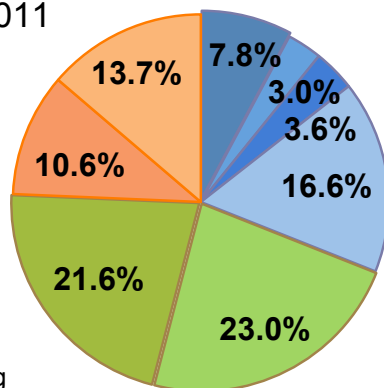


New Jersey had an average of 3,133 establishments in this cluster in 2011. These establishments gained 8.1 percent over the 5-year period 2006–2011.

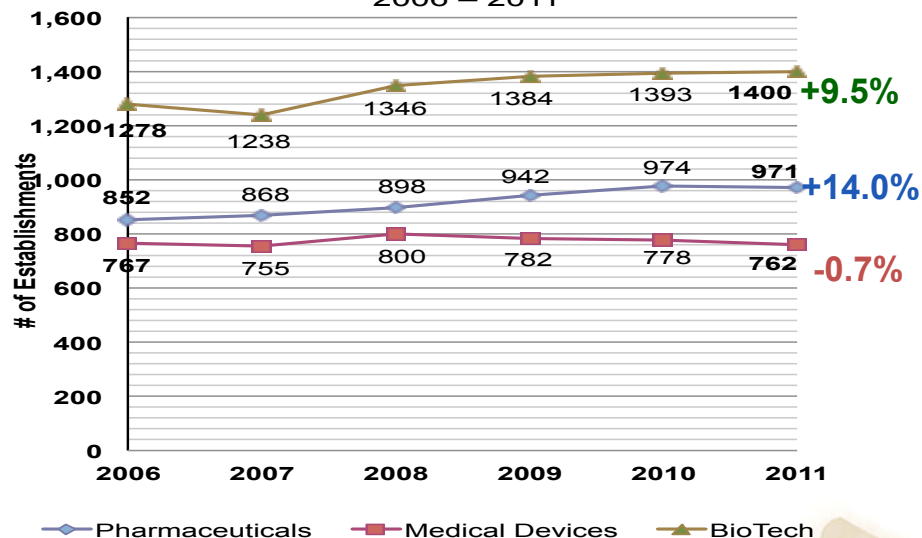
Industry Establishments

2011

- Pharma & Medicine Mfg.
- Soap Compounds Mfg.
- Toilet Prep Mfg.
- Drugs & Druggists Sundries W/S
- Scientific R&D Services
- Medical & Diagnostic Labs
- Measuring & Cont'l Inst Mfg.
- Medical Equipment & Supplies Mfg



5-Year Establishment Trend
2006 – 2011



SOURCE: Quarterly Census of Employment and Wages, 2011



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Concentration of Establishments

Life Science Employers

Northern Region

Establishments:
1,358

Central Region

Establishments:
1,031

Life Science Employers

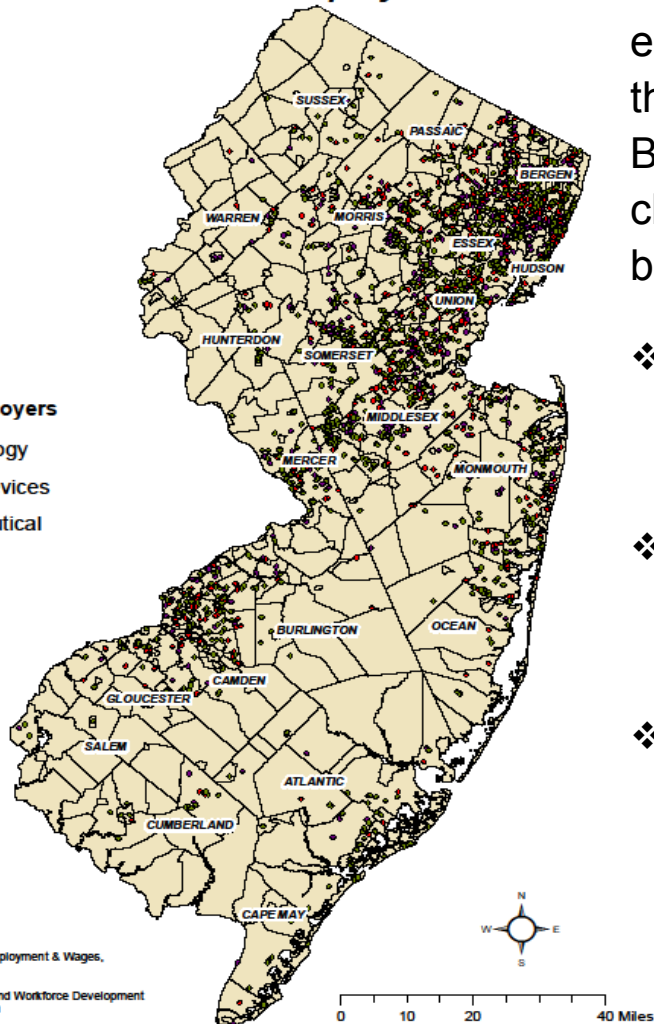
- Biotechnology
- Medical Devices
- Pharmaceutical

Southern Region

Establishments:
342

Unidentifiable by Region

Establishments:
12.9%



Data Source: Quarterly Census of Employment & Wages,
2010 Second Quarter, NJLWD
Prepared by:
New Jersey Department of Labor and Workforce Development
Bureau of Labor Market Information
August 2011

New Jersey had over 3,100 establishments directly engaged in this exceptionally highly concentrated Bio-Pharmaceutical Life Sciences cluster in 2011. The establishment breakdown *by region* was as follows:

- ❖ **Northern Region** accounts for 43.3 percent of Life Sciences led by the **Biotech** component. (39.7%)
- ❖ **Central Region** accounts for 32.9 percent of Life Sciences led by the **Biotech** component. (44.3%)
- ❖ **Southern Region** accounts for 10.9 percent of Life Sciences led by the **Biotech** component. (54.7%)

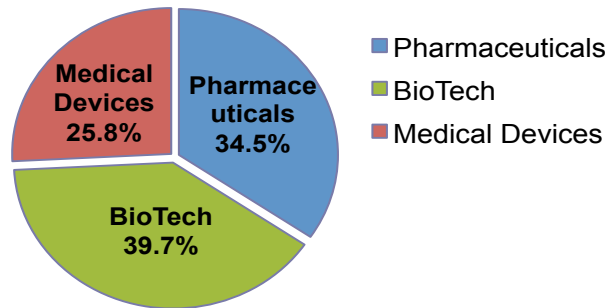


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Northern NJ Regional Establishments

NNJ Regional Establishments
2011

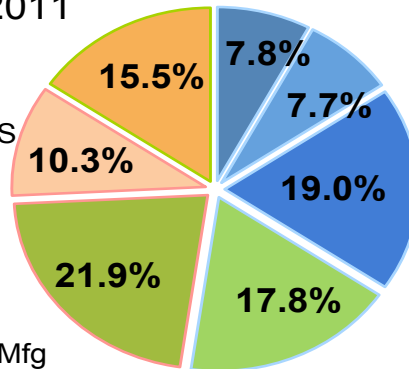


Northern New Jersey had an average of 1,358 establishments in this cluster in 2011. These establishments gained 1.6 percent over the 5-year period 2006–2011.

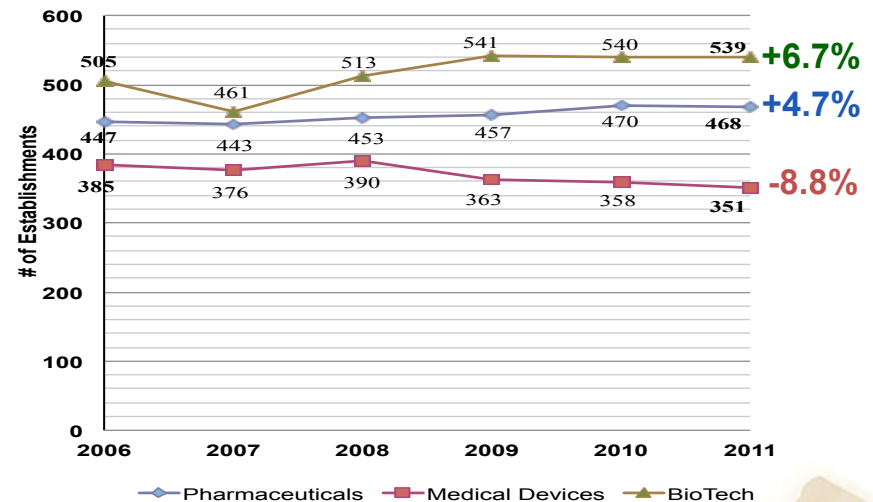
NNJ Industry Establishments

2011

- Pharma & Medicine Mfg.
- Soap & Compound Mfg.
- Drugs & Druggists Sundries W/S
- Scientific R&D Services
- Medical & Diagnostic Labs
- Measuring & Cont'l Inst Mfg.
- Medical Equipment & Supplies Mfg



5-Year Establishment Trend
2006 – 2011



SOURCE: Quarterly Census of Employment and Wages, 2011



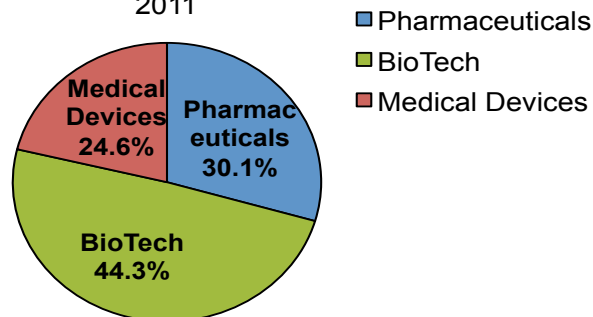
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Central NJ Regional Establishments

Central NJ Establishments

2011

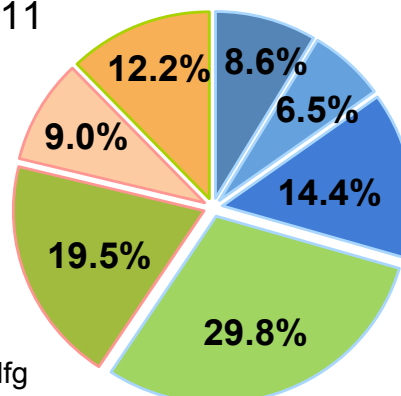


Central New Jersey averaged 1,031 establishments in this cluster in 2011. These establishments gained 9.0 percent over the 5-year period 2006–2011.

CNJ Industry Establishments

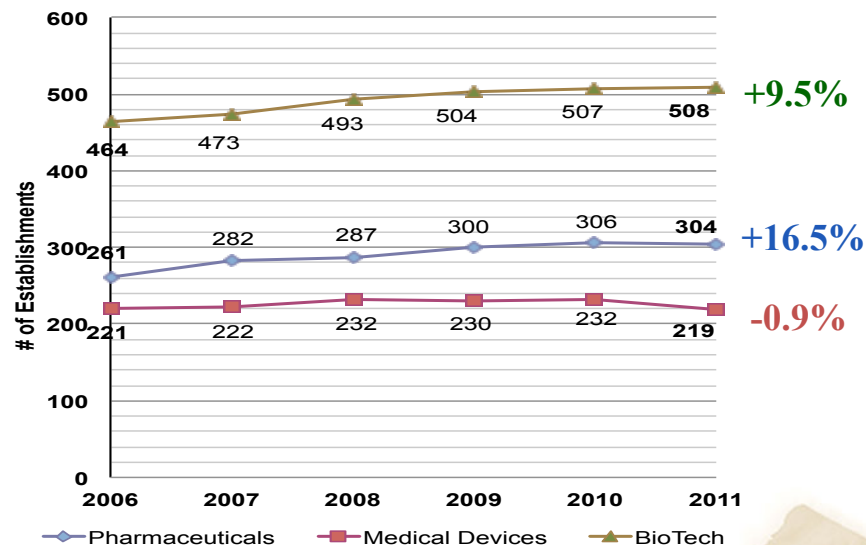
2011

- Pharma & Medicine Mfg.
- Soap & Compound Mfg.
- Drugs & Druggists Sundries W/S
- Scientific R&D Services
- Medical & Diagnostic Labs
- Measuring & Cont'l Inst Mfg.
- Medical Equipment & Supplies Mfg



5-Year Establishment Trend

2006 – 2011



SOURCE: Quarterly Census of Employment and Wages, 2011

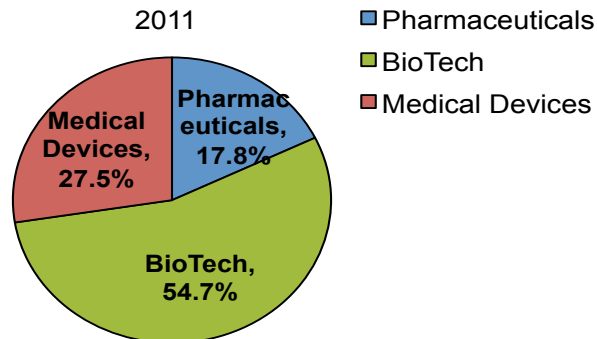


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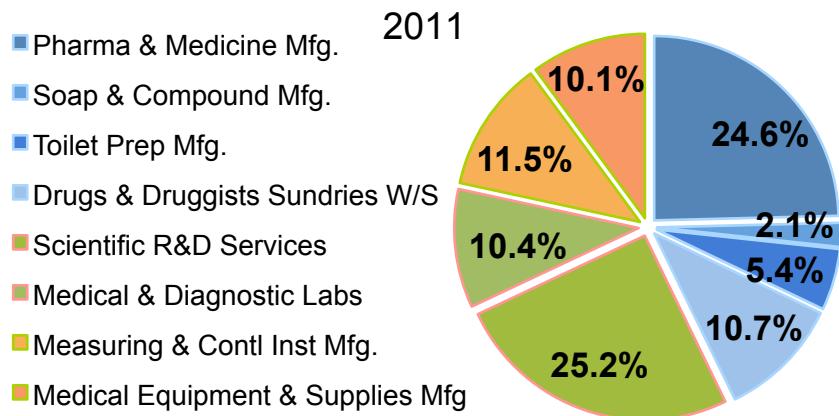
Southern NJ Regional Establishments

Southern NJ Establishments

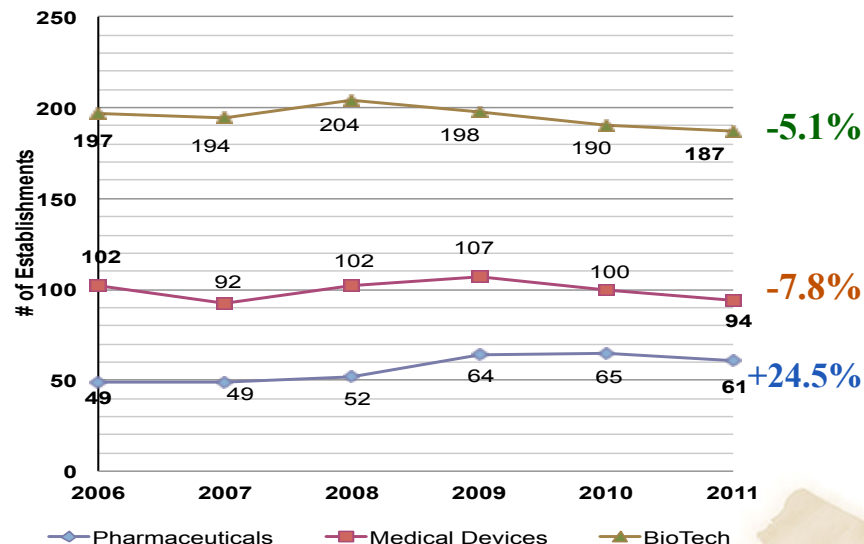


Southern NJ averaged 342 establishments in this cluster in 2011. These establishments lost 1.7 percent over the 5-year period 2006–2011.

Industry Employment



5-Year Establishment Trend 2006 – 2011



SOURCE: Quarterly Census of Employment and Wages, 2011



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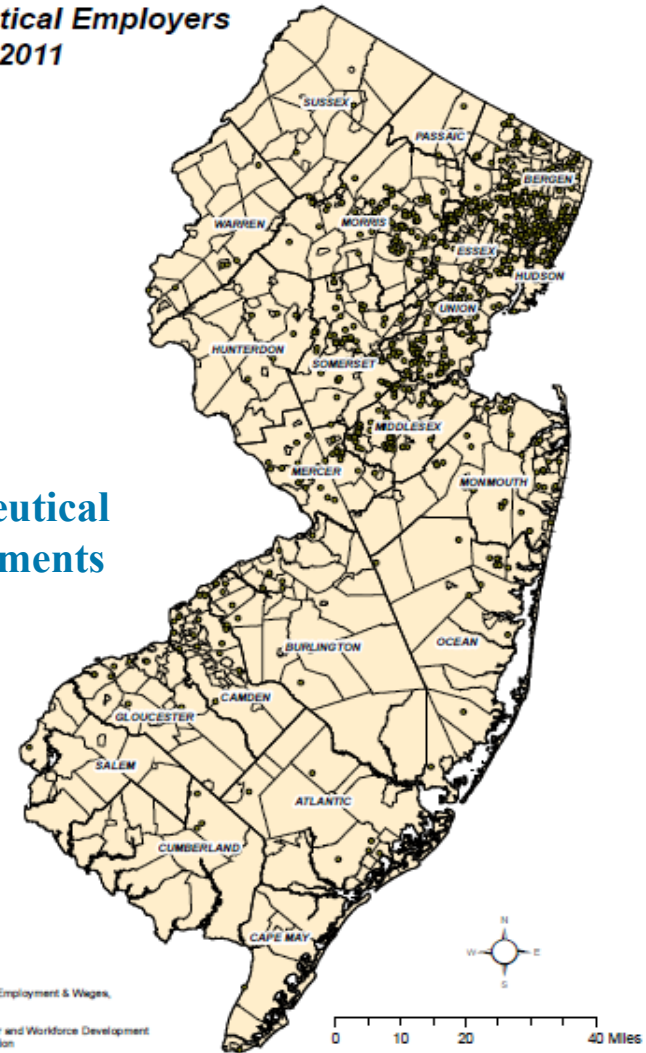
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Establishment Concentration

Pharmaceutical establishments have a powerful presence in northern New Jersey, attracted by an excellent labor pool, major universities and access to all modes of terrific transportation.

Pharmaceutical Employers
2011

971
Pharmaceutical
Establishments



Data Source: Quarterly Census of Employment & Wages,
2011 Second Quarter, NJLWD
Prepared by:
New Jersey Department of Labor and Workforce Development
Bureau of Labor Market Information
November 2012



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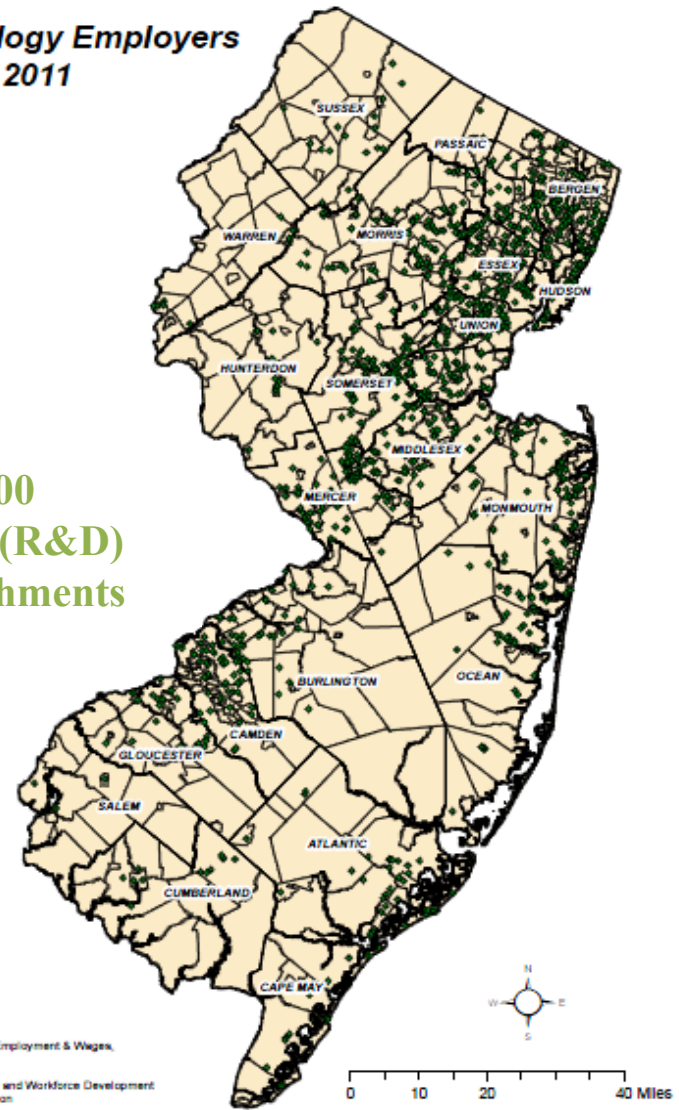
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Establishment Concentration

Biotech establishments have a strong presence in New Jersey, especially in the “Einstein Alley Corridor” area. Nearby universities and incubators are a significant contributing factor.

*Biotechnology Employers
2011*

**1,400
Biotech (R&D)
Establishments**



Data Source: Quarterly Census of Employment & Wages,
2011 Second Quarter, NJLWD
Prepared by:
New Jersey Department of Labor and Workforce Development
Bureau of Labor Market Information
November 2012



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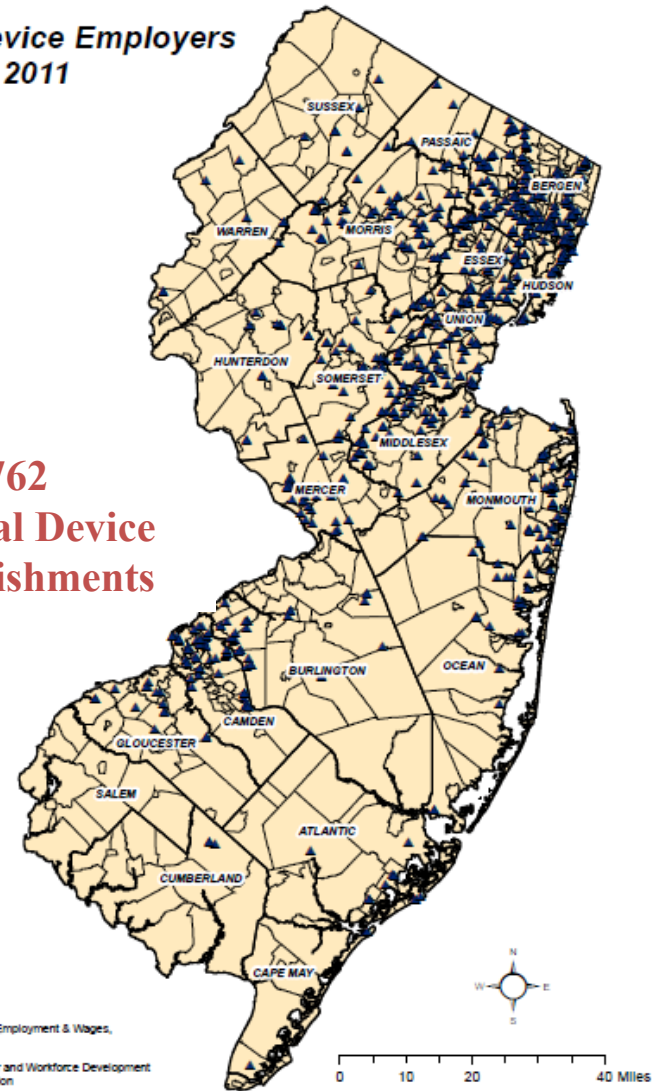
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Establishment Concentration

Medical Device establishments have a robust presence in New Jersey, especially in the northeastern section of the state in the heart of the manufacturing area, adjoining “Pharma” country.

*Medical Device Employers
2011*

**762
Medical Device
Establishments**



Data Source: Quarterly Census of Employment & Wages,
2011 Second Quarter, NJLWD
Prepared by:
New Jersey Department of Labor and Workforce Development
Bureau of Labor Market Information
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Concentration of Pharmaceutical Establishments

Pharmaceutical Employers 2011

Northern Region

Establishments:
468

Central Region

Establishments:
304

Life Science Employers

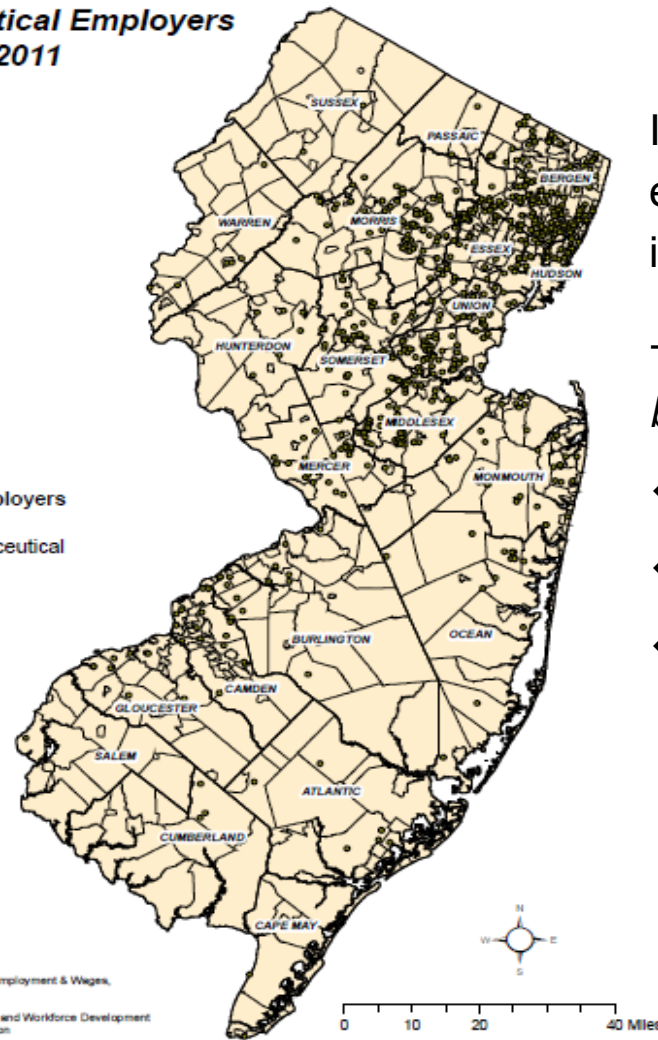
• Pharmaceutical

Southern Region

Establishments:
61

Unidentifiable by Region

Establishments: 14.2%



Date Source: Quarterly Census of Employment & Wages,
2011 Second Quarter, NJLWD
Prepared by:
New Jersey Department of Labor and Workforce Development
Bureau of Labor Market Information
November 2012

In 2011, New Jersey averaged 971 establishments directly engaged in the pharmaceutical industries.

The establishment breakdown *by region* was as follows:

- ❖ **Northern Region:** 48.2%.
- ❖ **Central Region:** 31.3%.
- ❖ **Southern Region:** 6.3%.



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Concentration of Biotechnology Establishments

Biotechnology Employers 2011

Northern Region

Establishments:

539

Central Region

Establishments:

508

Southern Region

Establishments:

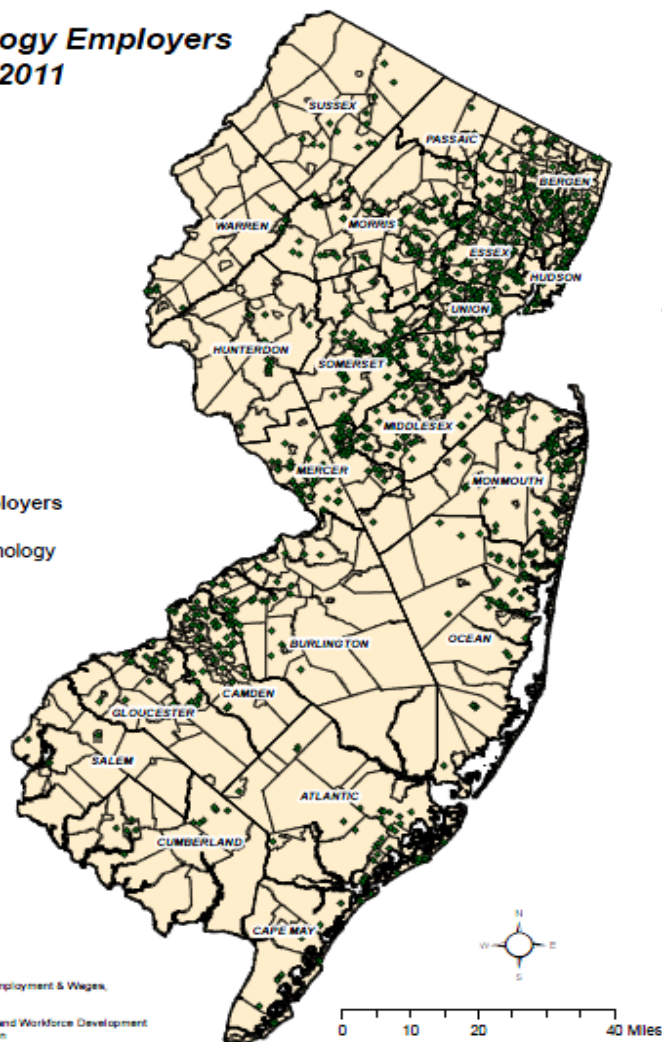
187

Unidentifiable by Region

Establishments: 11.9%

Life Science Employers

Biotechnology



In 2011, New Jersey averaged 1,400 establishments directly engaged in the biotechnology industries.

The establishment breakdown *by region* was as follows:

- ❖ Northern Region: 38.5%.
- ❖ Central Region: 36.3%.
- ❖ Southern Region: 13.3%.

Date Source: Quarterly Census of Employment & Wages,
2011 Second Quarter, N.J. LWD
Prepared by:
New Jersey Department of Labor and Workforce Development
Bureau of Labor Market Information
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Concentration of Medical Device Establishments

**Medical Device Employers
2011**

Northern Region

Establishments:

351

Central Region

Establishments:

219

Life Science Employers

▲ Medical Devices

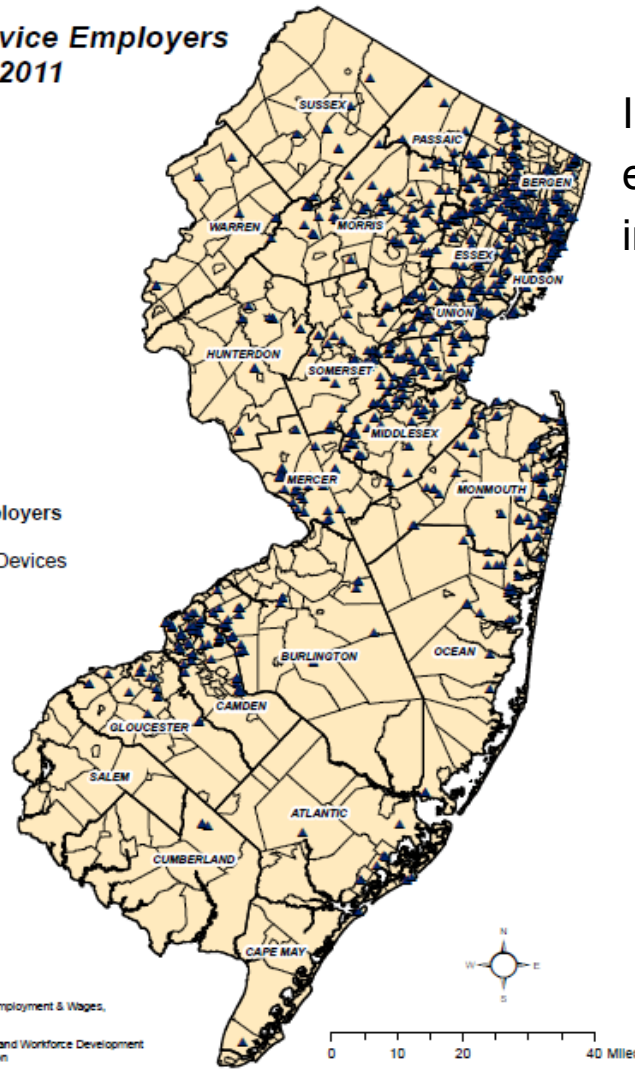
Southern Region

Establishments:

94

Unidentifiable by Region

Establishments: 12.9%



Source: Quarterly Census of Employment & Wages,
11 Second Quarter, NJLWD
prepared by:
New Jersey Department of Labor and Workforce Development
Bureau of Labor Market Information
November 2012

In 2011, New Jersey averaged 762 establishments directly engaged in the medical device industries.

The establishment breakdown *by region* was as follows:

- ❖ **Northern Region: 46.1%**
- ❖ **Central Region: 28.7%**
- ❖ **Southern Region: 12.3%**



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Summary of Employment & Establishments

Geographic summary of Life Sciences employment & establishments in New Jersey

Employment *	2011		5-Year (2006-2011) Trend			
	Cluster		Pharmaceutical	Biotech	Medical Device	Overall Cluster
Statewide	121,655		-17.5%	4.7%	-4.9%	-7.9%
Northern New Jersey	59,319	48.8%	-22.5%	26.1%	-13.0%	-8.8%
Central New Jersey	48,150	39.6%	-15.3%	-7.9%	13.6%	-8.8%
Southern New Jersey	11,603	9.5%	8.9%	-16.5%	-6.5%	-6.2%
Establishments *	2011		5-Year (2006-2011) Trend			
	Cluster		Pharmaceutical	Biotech	Medical Device	Overall Cluster
Statewide	3,133		9.5%	14.0%	-0.7%	8.1%
Northern New Jersey	1,358	43.3%	6.7%	4.7%	-8.8%	1.6%
Central New Jersey	1,031	32.9%	16.5%	9.5%	-0.9%	9.0%
Southern New Jersey	342	10.9%	24.5%	-5.1%	-7.8%	-1.7%

SOURCE: NJLWD, Quarterly Census of Employment and Wages, Annual Averages

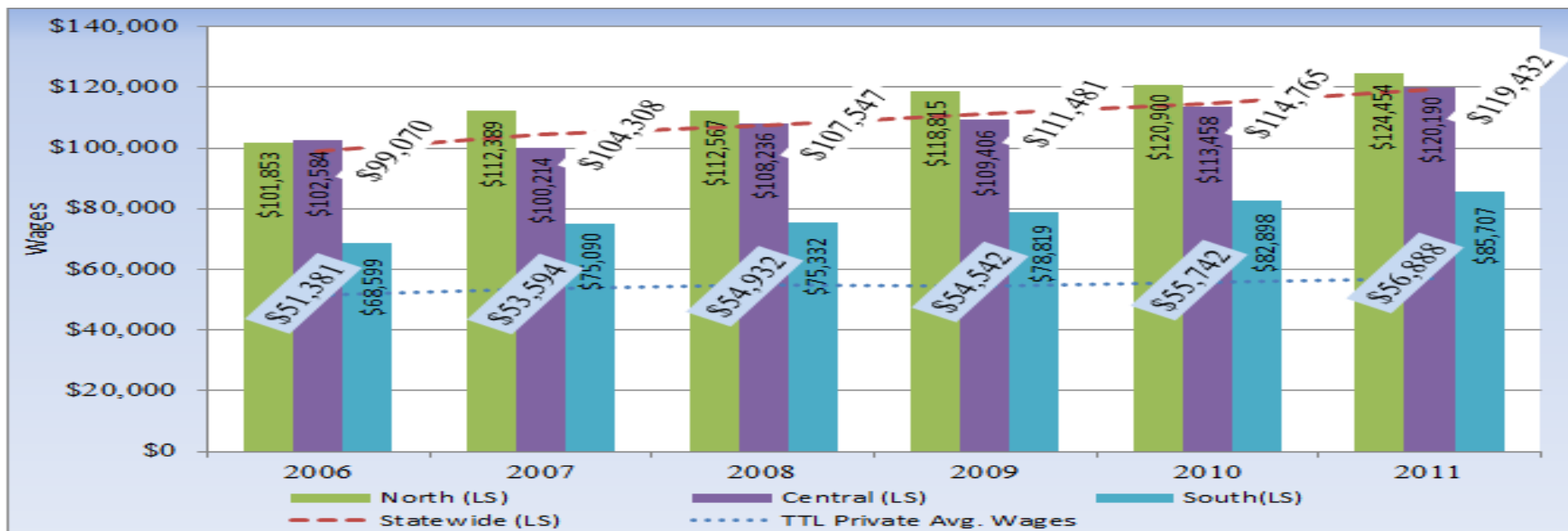
* Note: Not all data was identifiable by region. Specifically:
Employment: 0.9% *Establishments: 13.1%*



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Average Annual Wages



This cluster's statewide 2011 annual average wage was \$119,432, which was 109.9 percent higher than the state's total private sector's average wages of \$56,888. The cluster's three components (*statewide*) all had wages that were significantly higher than the statewide total private average wages; Medical Device \$94,572 (66.2%), Biotech \$116,032 (104.0) and Pharmaceuticals \$134,721 (136.8%).

SOURCE: NJLWD, Quarterly Census of Employment and Wages, Annual Averages



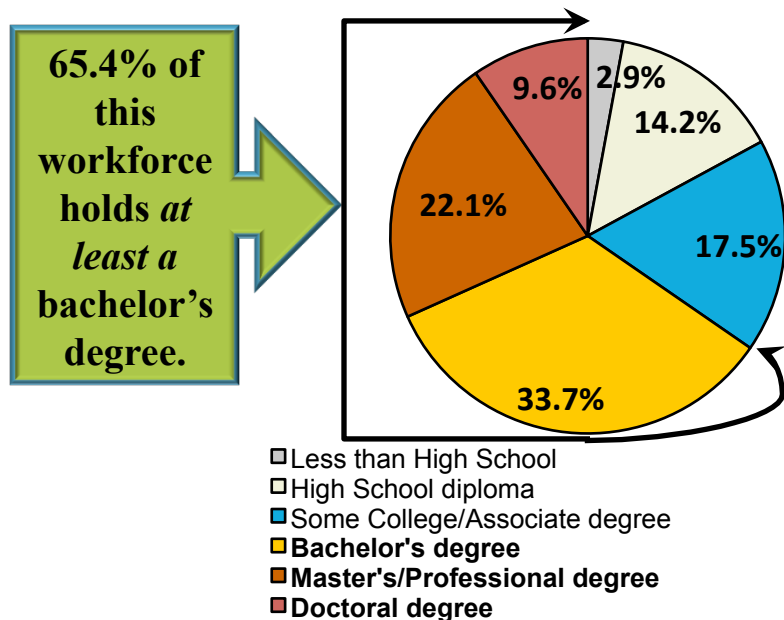
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Education

Due to the high level and technical demands of many of the occupations found in this cluster, these related New Jersey employers had a tremendous need for highly well-educated workers.

Educational Breakdown
(2011)



Source: 2011 American Community Survey Public Use Microdata Sample

New Jersey's highly well-educated workforce is realized in this cluster as nearly *two-thirds* of its workforce holds *at least* a bachelor's degree.

- ❖ Bachelor's: 33.7%
- ❖ Master's/Professional: 22.1%
- ❖ Doctorate: 9.6%



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Economic Development Projects in New Jersey's Bio-Pharmaceutical Life Sciences Cluster



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Northern NJ

Bio-Pharmaceutical Life Sciences Cluster

ECONOMIC DEVELOPMENT PROJECTS

ThorLabs

Newton, NJ

The company recently opened a new 120,000-sq.ft.-three-story facility in Newton. In addition, it intends to expand its facility in Andover Twp.

DSM Nutritional Products

White Twp.

Capital Inv: \$200M into expansion: +160 jobs.

BASF

Florham Park, NJ

Relocation / Expansion

Also adding its pharmaceutical supply unit here.

Merck & Co.

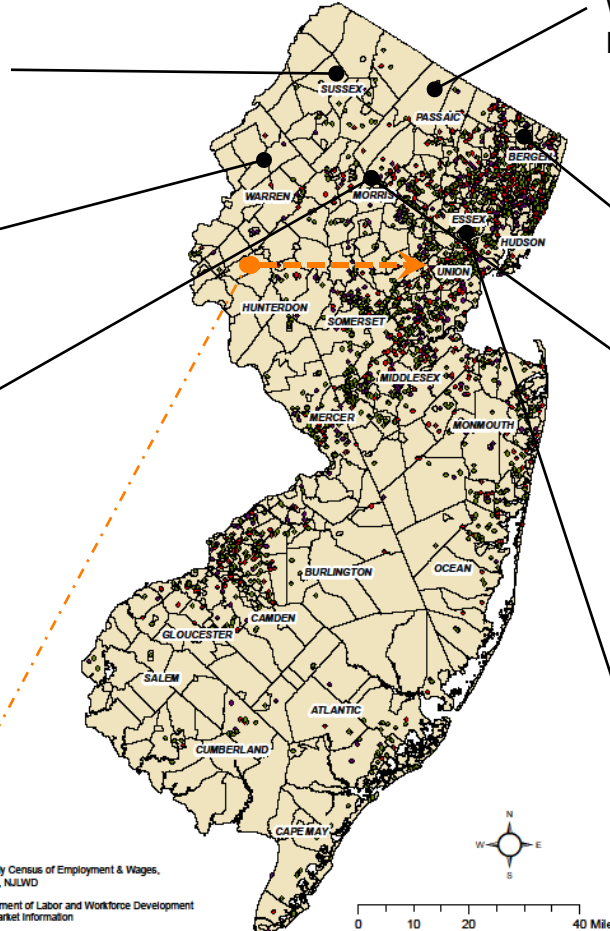
Summit, NJ

(Relocating from Whitehouse Station, NJ.)

Involves approximately 2,000 jobs.

Also an expansion project, which includes setting up the Animal Vet. Unit in Summit.

Life Science Employers



BAE Systems

Wayne, NJ

Retention / Investment

Suzhou Pharma Svcs.

Lyndhurst, NJ

New: Contract development & manufacturing organization with new corporate headquarters.

Bayer HealthCare

Whippany, NJ

Retention/ Expansion
Jobs involved: 1,500 – 2,500

Panasonic Healthcare

Newark, NJ

New healthcare division to focus on the life sciences, hearing care and diagnostics.

Data Source: Quarterly Census of Employment & Wages,
2010 Second Quarter, NJLWD
Prepared by:
New Jersey Department of Labor and Workforce Development
Bureau of Labor Market Information
August 2011



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Central NJ

Bio-Pharmaceutical Life Sciences Cluster

ECONOMIC DEVELOPMENT PROJECTS

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Ipsen

Basking Ridge, NJ
Established its new North American headquarters
Create new jobs: 100 (apx).

Actavis, Inc.

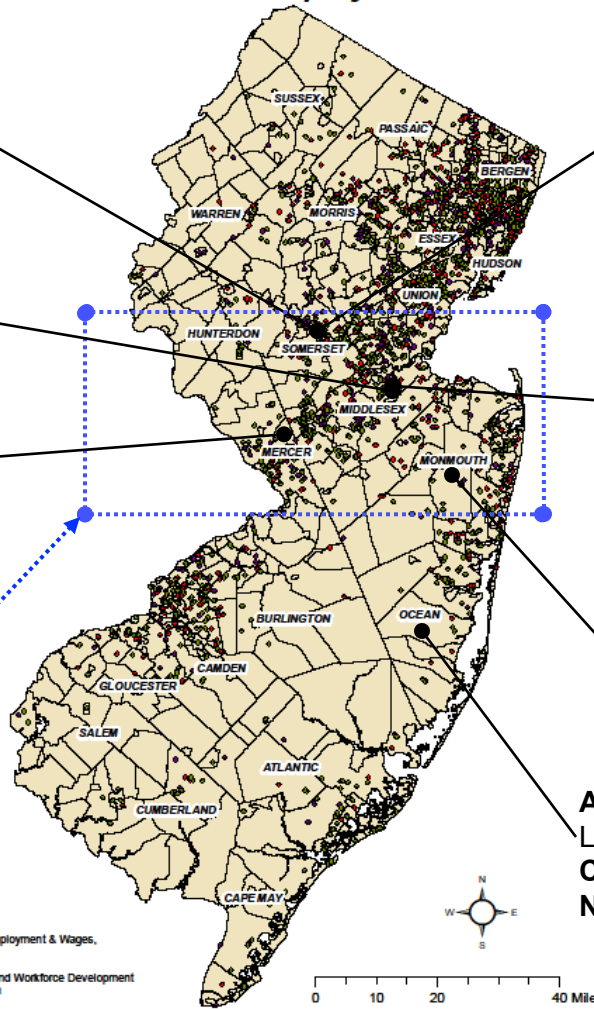
North Brunswick, NJ
 Invest \$4.5 million to establish a Global R&D Technology Center. About 50 new jobs to include scientists, chemists, engineers & support staff.

SciPark

East Windsor, NJ
Current status: Under construction.
When completed: A quarter-million square feet of space intended to attract science & technological based companies.

"5 percent of the [Hunterdon, Mercer, Middlesex, Monmouth & Somerset Counties] office space, about 6.5 million square feet, is laboratory space and other specialized space for biotechnology companies."
 — NY Times, February 2, 2012.

Data Source: Quarterly Census of Employment & Wages,
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Allergan

Bridgewater, NJ
 Leased 93,000-sq.ft. of space.
 Investment: \$12 million
 New Jobs: 400 (apx)

Novo Nordisk

Plainsboro, NJ
Expansion: \$215 million project for its new 770,000-sq.ft. headquarters. + 100 new jobs.

Clinilabs

Eatontown, NJ
Expansion: Set up new unit to provide clinical drug development services to the pharmaceutical industry.

Accupac

Lakewood, NJ
Capital Investment: \$1.7M
New Jobs: +300



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Southern NJ

Bio-Pharmaceutical Life Sciences Cluster

ECONOMIC DEVELOPMENT PROJECTS

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Rowan University

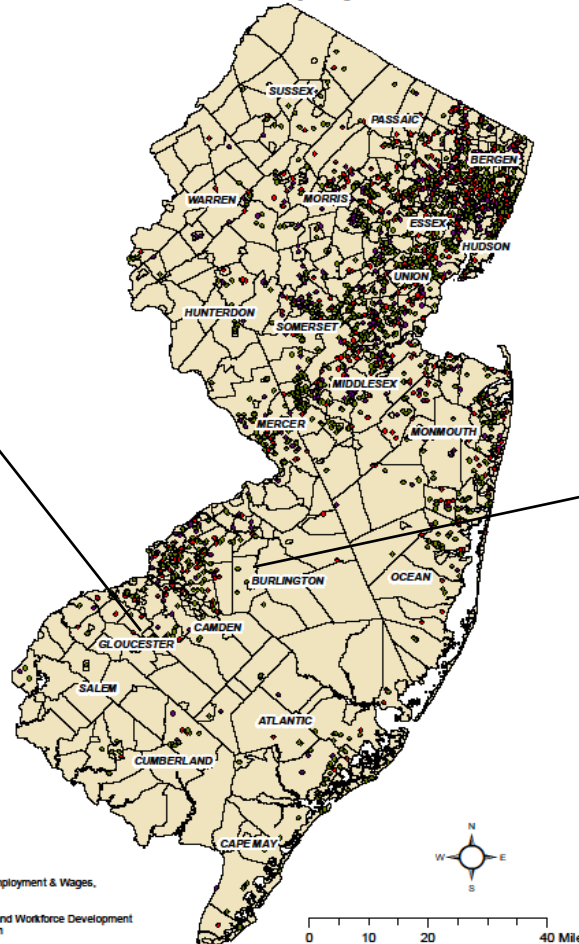
Glassboro, NJ

Formed a new School of Biomedical Sciences, which operates in conjunction with the colleges of Science & Mathematics and Engineering.

The school addresses a growing need in the region for programs to prepare students for careers in healthcare-related fields, from pharmacy to biomedical engineering.

This school will contribute toward developing the educated workforce that businesses need if they are going to relocate to South Jersey.

CRI Lifetree, a company specializing in early-stage research focused in pain, human abuse liability, psychiatry, neurology and diabetes, opened a new state-of-the-art, early-stage research facility in Marlton, NJ



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UPDATES
Relevant to New Jersey's
Bio-Pharmaceutical
Life Sciences
Cluster



State of New Jersey

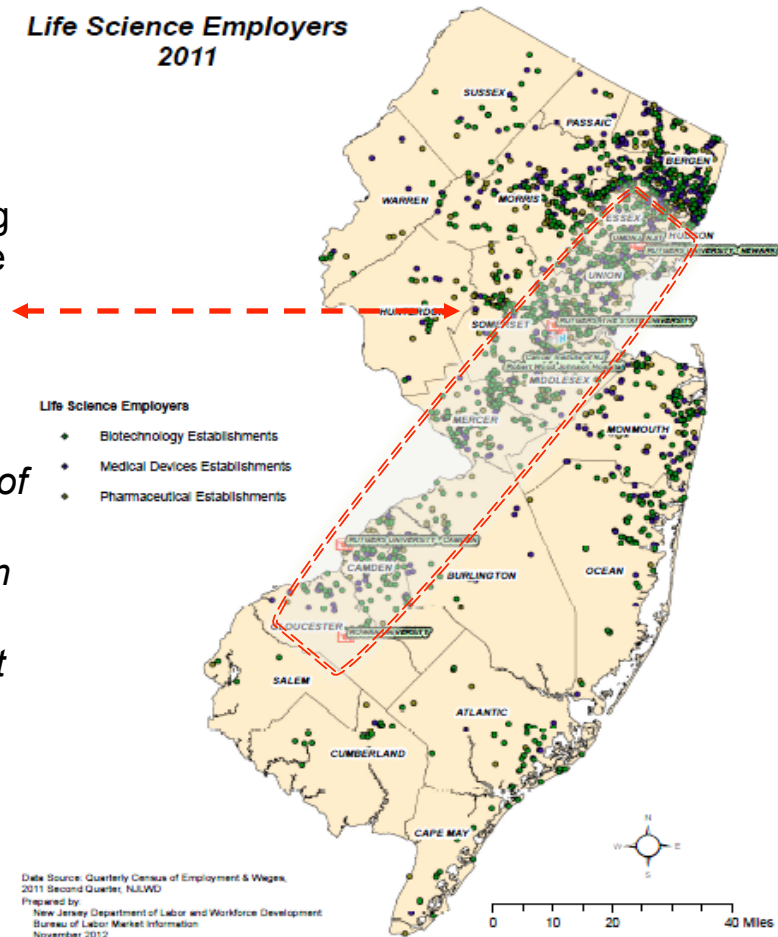
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UPDATES

Cluster Development in New Jersey

- ❖ **Changing paradigm** is affecting the way these companies are making decisions involving what products and services will be researched and developed.
- ❖ **Changing “cluster” business approach** is having significant influence on where these companies are locating and relocating operations.
 - *New Jersey has taken steps to address these changes, such as developing greater partnerships among educational institutions (e.g., Rutgers University / New Jersey Institute of Technology / Rowan University) — along with promoting and supporting stronger collaboration of hospitals and other related businesses — to ensure the success of the cluster’s employment and business growth in the Garden State!*
- ❖ **New Jersey is still a key player** nationally as well as globally, providing incredible value to the Bio-Pharmaceutical Life Sciences cluster.

**Life Science Employers
2011**



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New Jersey Department of Labor and Workforce Development

Office of Labor Planning & Analysis

http://lwd.dol.state.nj.us/labor/lpa/LMI_index.html

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